

MICROSOFT EXCEL



Doing More with
PivotTables

Contents

- Introduction
 - Filters
 - To add a filter
- Slicers
 - To add a slicer
- PivotCharts
 - To create a PivotChart
- Practice

Introduction

- ▶ As you learned in our previous lesson, **Intro to PivotTables**, PivotTables can be used to summarize and analyze almost any type of data. To help you manipulate your PivotTable—and gain even more insight into your data—Excel offers three additional tools: **filters**, **slicers**, and **PivotCharts**.

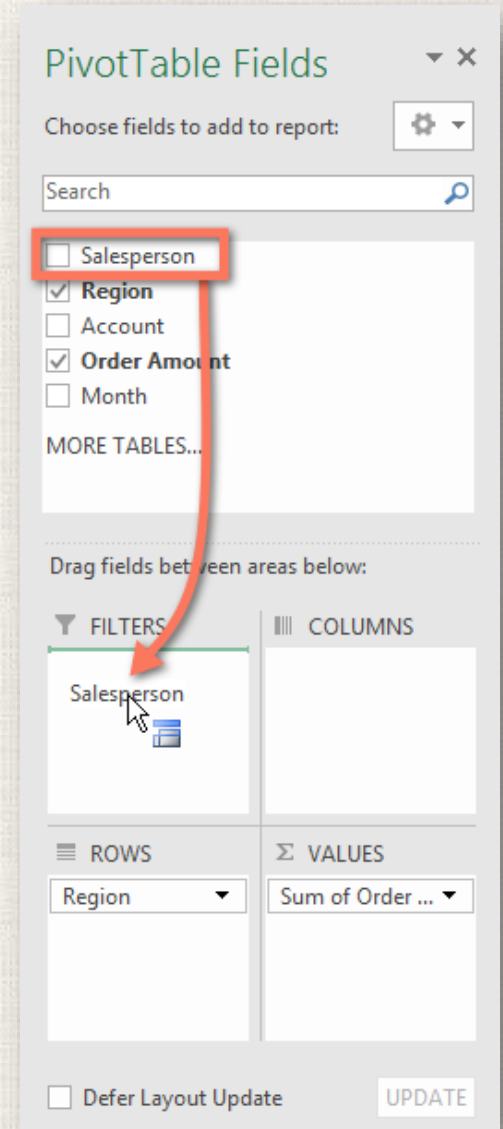
Filters

- Sometimes you may want focus on a certain section of your data. **Filters** can be used to **narrow down** the data in your PivotTable, so you can view only the information you need.

Adding a Filter

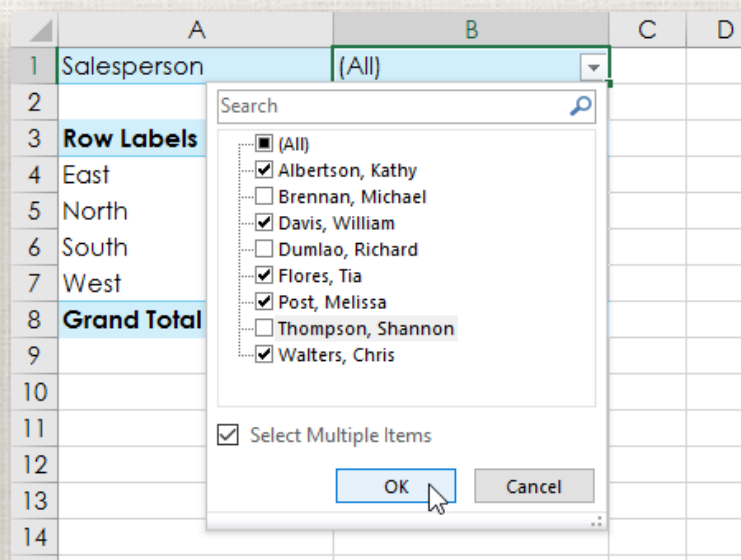
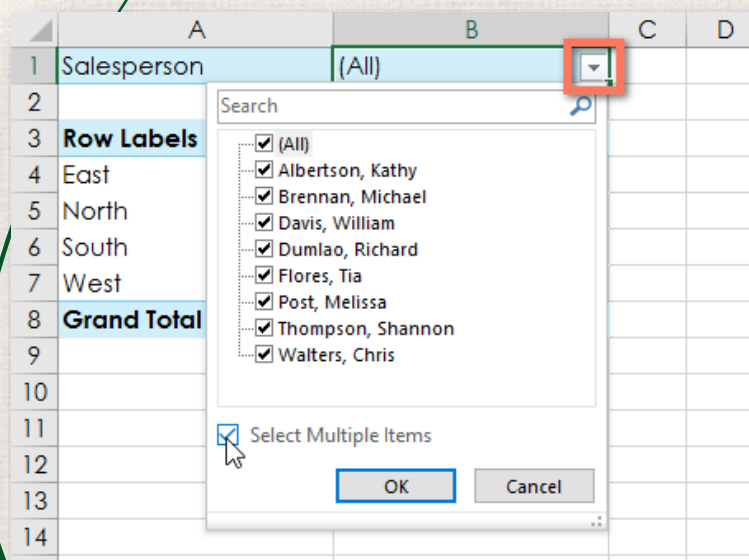
In the example below, we'll filter out certain **salespeople** to determine how their individual sales are impacting each region.

1. Drag a field from the **Field List** to the **Filters** area. In this example, we'll use the **Salesperson** field.



Adding a Filter

1. The **filter** will appear above the PivotTable. Click the **drop-down arrow**, then check the box next to **Select Multiple Items**.
2. **Uncheck** the box next to any item you don't want to include in the PivotTable. In our example, we'll uncheck the boxes for a few salespeople, then click **OK**.



Adding a Filter

3. The PivotTable will **adjust** to reflect the changes.

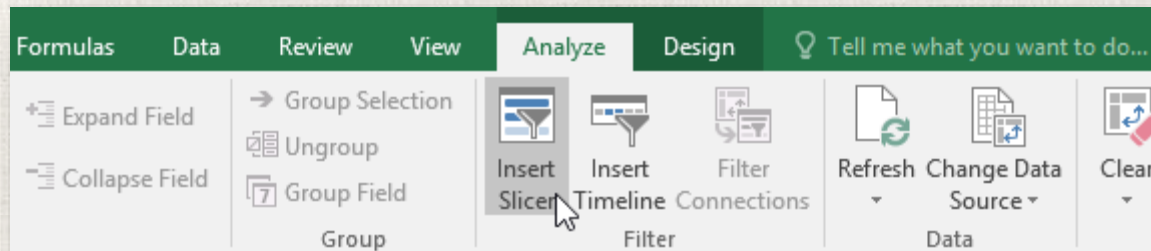
	A	B	C	D
1	Salesperson	(Multiple Items) 		
2				
3	Row Labels	Sum of Order Amount		
4	East	4340		
5	South	10875		
6	Grand Total	15215		
7				
8				

Slicers

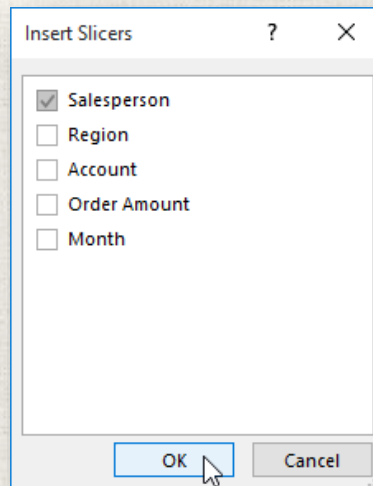
- **Slicers** make filtering data in PivotTables even easier. Slicers are basically just **filters** but are easier and faster to use, allowing you to instantly pivot your data. If you frequently filter your PivotTables, you may want to consider using slicers instead of filters.

Adding a Slicer

1. Select **any cell** in the PivotTable.
2. From the **Analyze** tab, click the **Insert Slicer** command.



3. A dialog box will appear. Check the box next to the desired **field**. In our example, we'll select **Salesperson**, then click **OK**.



Adding a Slicer

4. The slicer will appear next to the PivotTable. Each selected item will be highlighted in **blue**. In the example below, the slicer contains all eight salespeople, but only **five** of them are currently selected.

	A	B	C	D	E	F	G	H
1	Salesperson	(Multiple Items)						
2								
3	Row Labels	Sum of Order Amount						
4	East	4340						
5	South	10875						
6	Grand Total	15215						
7								
8								
9								
10								
11								
12								
13								
14								
15								

Salesperson
Albertson, Kathy
Brennan, Michael
Davis, William
Dumlao, Richard
Flores, Tia
Post, Melissa
Thompson, Shannon
Walters, Chris

Adding a Slicer

5. Just like filters, only **selected** items are used in the PivotTable. When you **select** or **deselect** an item, the PivotTable will instantly reflect the change. Try selecting different items to see how they affect the PivotTable. Press and hold the **Ctrl** key on your keyboard to select **multiple** items at once.

	A	B	C	D	E	F	G	H
1	Salesperson	(Multiple Items)						
2								
3	Row Labels	Sum of Order Amount						
4	North	3160						
5	South	10875						
6	West	5190						
7	Grand Total	19225						
8								
9								
10								
11								
12								
13								
14								
15								

You can also click the **Filter icon** in the top-right corner of the slicer to select **all** items at once.

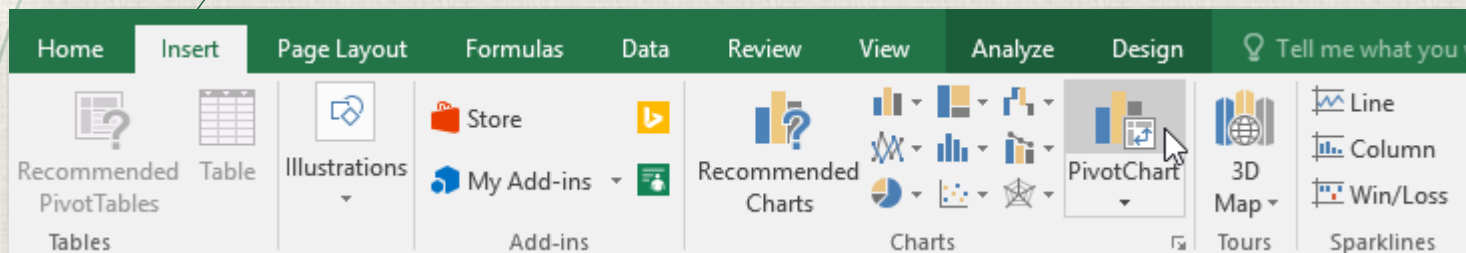
PivotCharts

- **PivotCharts** are like regular charts, except they display data from a **PivotTable**. Just like regular charts, you'll be able to select a **chart type**, **layout**, and **style** that will best represent the data.

Creating a PivotChart

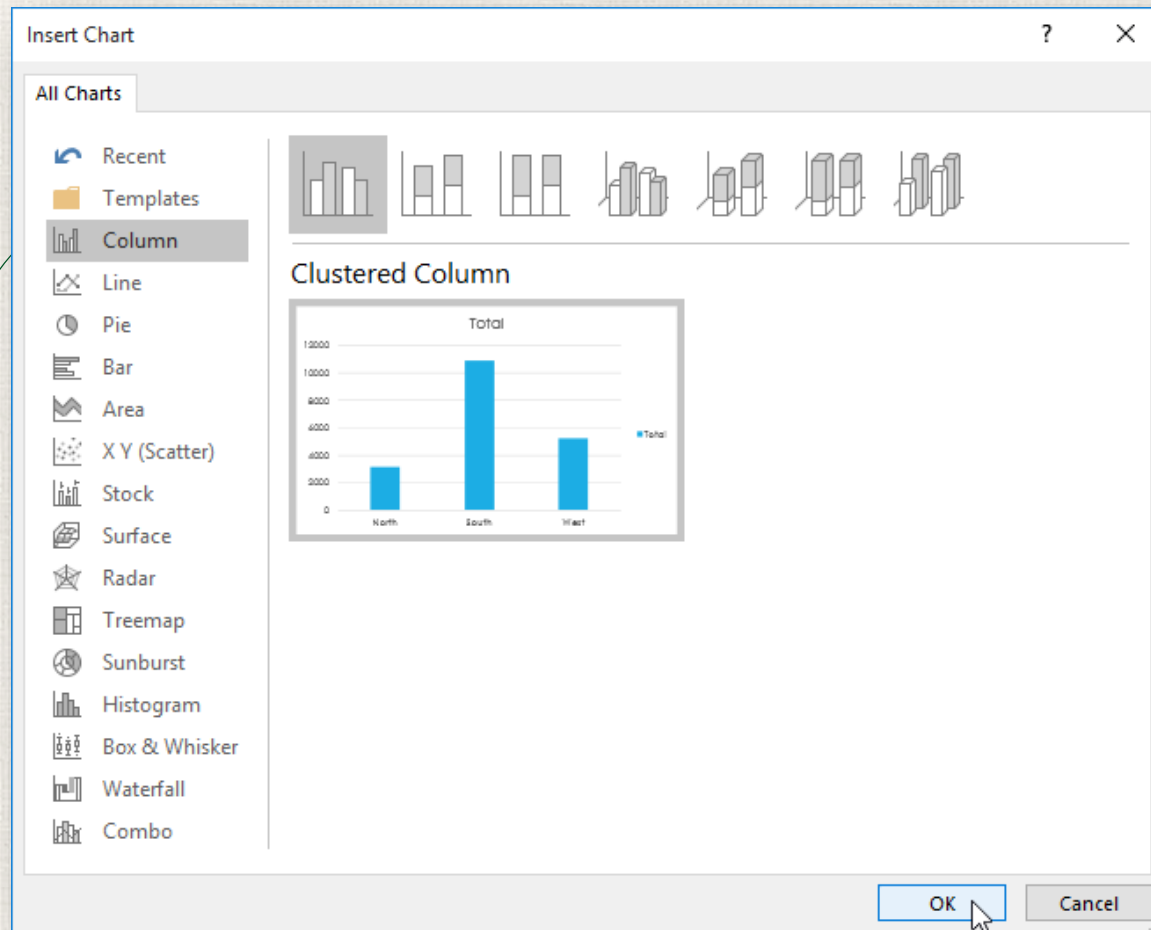
In the example below, our PivotTable is showing a portion of each region's **sales figures**. We'll use a PivotChart so we can see the information more clearly.

1. Select **any cell** in your PivotTable.
2. From the **Insert** tab, click the **PivotChart** command.



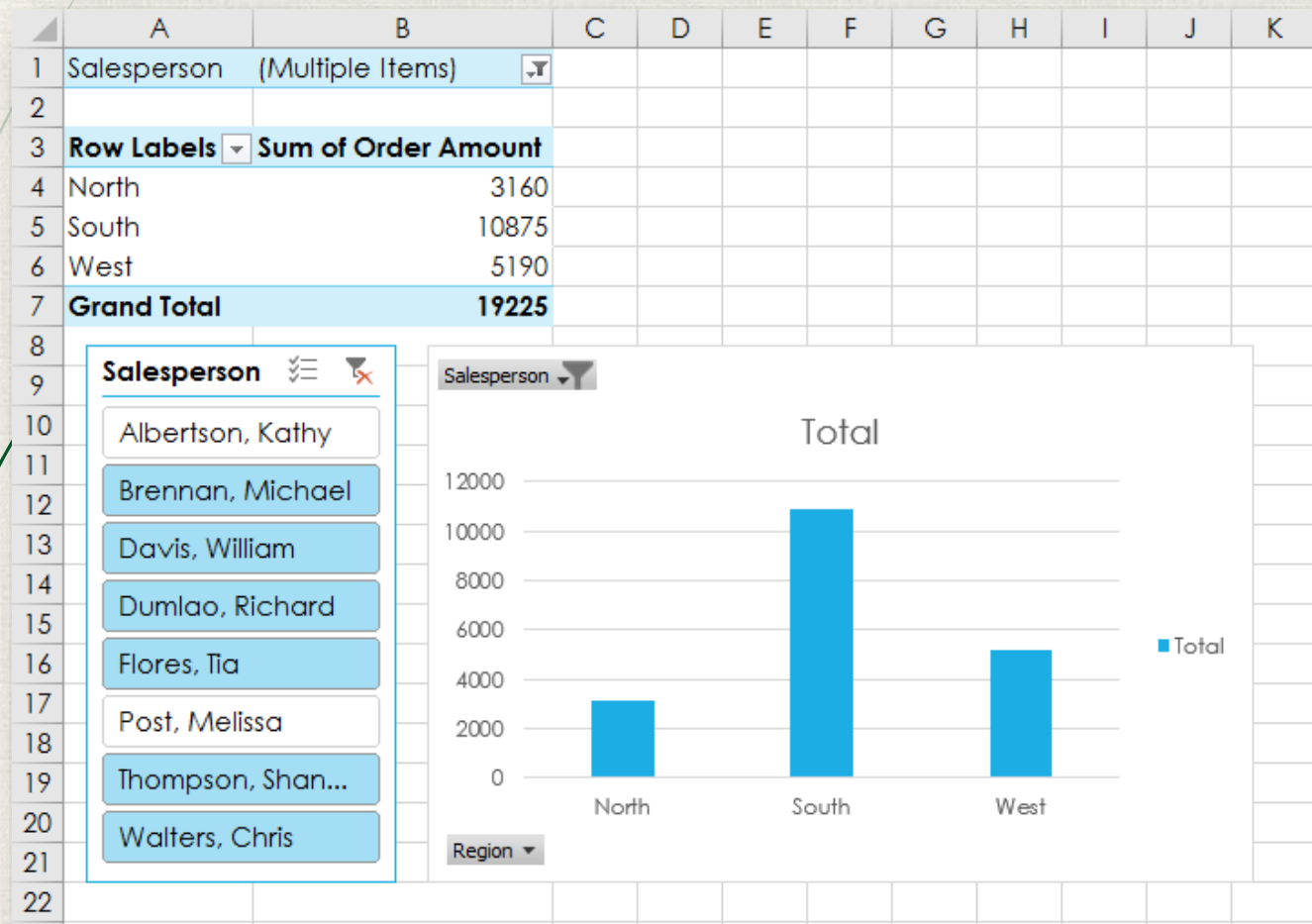
Creating a PivotChart

3. The **Insert Chart** dialog box will appear. Select the desired **chart type** and **layout**, then click **OK**.



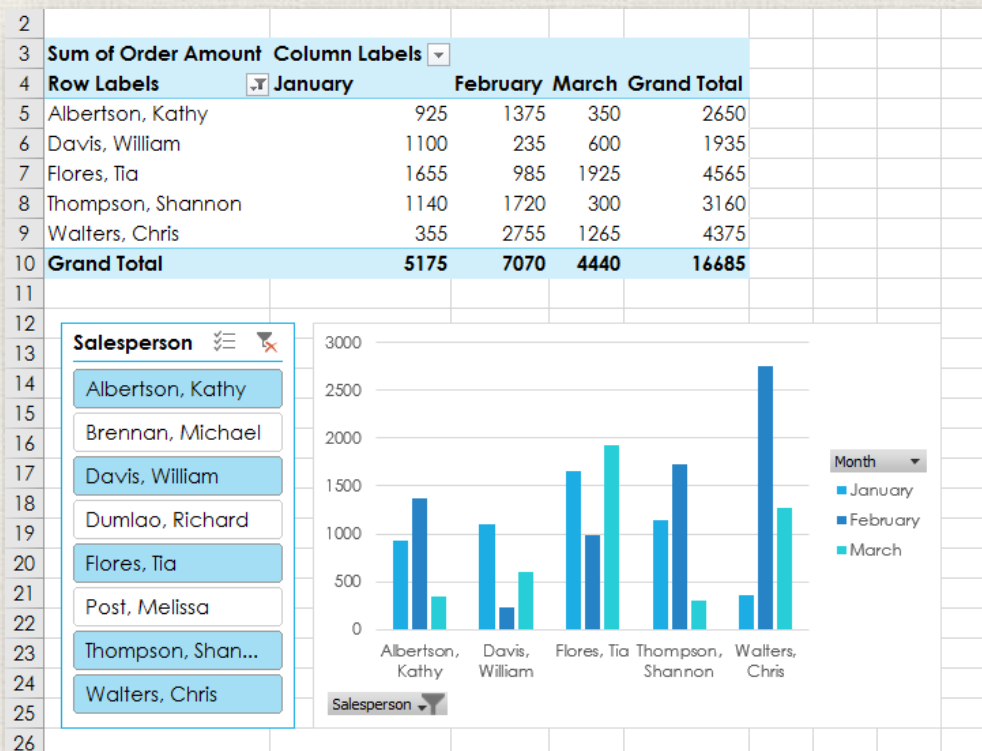
Creating a PivotChart

4. The PivotChart will appear.



Creating a PivotChart

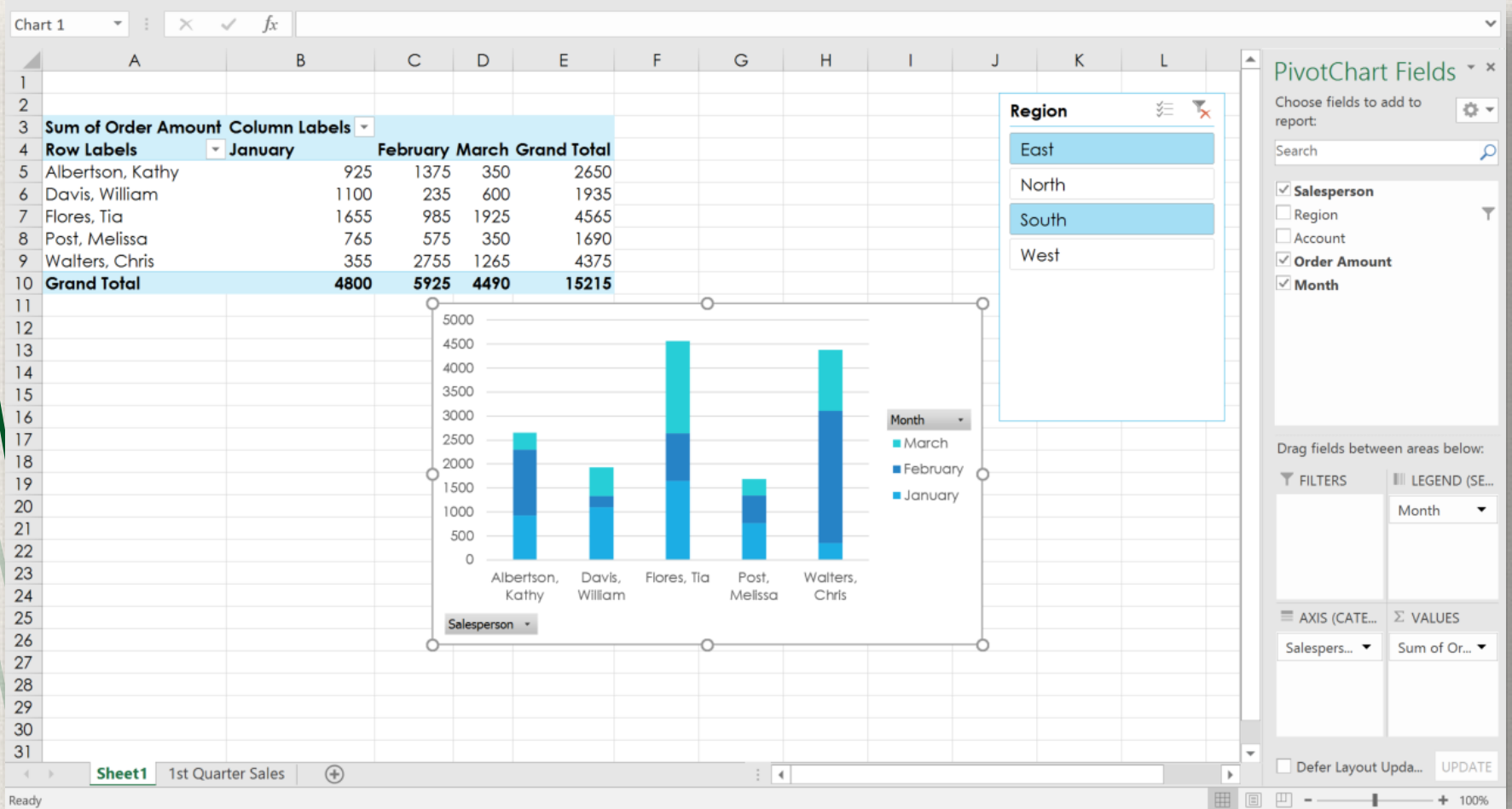
- Try using **filters** or **slicers** to narrow down the data in your PivotChart. To view different subsets of information, change the **columns** or **rows** in your PivotTable. In the example below, we've changed the PivotTable to view the **monthly sales** for each salesperson.

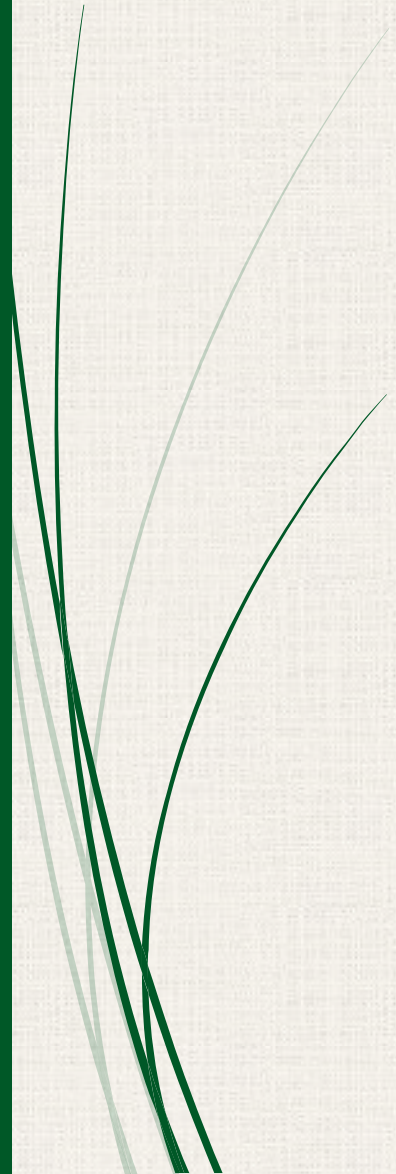


Practice

- Open our **practice workbook**.
- In the **Rows** area, remove **Region** and replace it with **Salesperson**.
- Insert a **PivotChart**, and choose the type **Line with Markers**.
- Insert a **slicer** for **Regions**.
- Use the **slicer** to only show the **South** and **East** regions.
- Change the **PivotChart** type to **Stacked Column**.
- In the **PivotChart Fields** pane to the right, add **Month** to the **Legend (Series)** area. **Note:** You can also click the PivotTable and then add **Month** to the **Columns** area; the result will be the same.

Solution





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